

Views

About Views

The Unit Travel System (UTS) can be operated in one of four different view modes. The various view modes are used to determine what **privileges** and **capabilities** the user possesses. View modes are associated to the users **profile** and are established by the **System Administrator**.

When a user account is created, the **default** view is **Traveler** unless the System Administrator gives the user Authorizing Official or System Administrator privileges.

Note: Any user can change their view to **Proxy** and perform services on behalf of any other Traveler sharing the same unit number.

Tip: A View can also be defined as the user's **Privilege**.

See Also

Changing Views

About Profiles

About Travelers

About Proxies

About Authorizing Officials

About System Administrators

View Modes

Traveler, Proxy, Authorizing Official, System Administrator

Changing View

When a **Personal Profile** is created, a user may be given privileges for several different **View** modes. In order to perform the functions associated with a particular view, however, it may be necessary to change the View after logging into UTS.

Complete the following steps to change a View mode:

1. Login to UTS. Notice that the type of View is displayed at the **View** field on the **UTS Request Status** or **UTS Requests Requiring Action** screen.
2. **Click** on the **Set View** menu. A drop down menu appears listing the various view modes that the user has privileges for.

3. **Click** on the **View** mode you wish to use.
4. The new mode will appear at the **View** field.

See Also

View Modes

About Travelers

About Proxies

About Authorizing Officials

About System Administrators

Traveler

About Travelers

The **Traveler** View mode is used by individuals who perform travel on behalf of the US Government and will use UTS to process their requests for advance or reimbursement of travel expenses. When logged into UTS in the Traveler View, the user has the ability to generate a variety of travel actions.

By clicking on the **File** menu at the **UTS Request Status** screen and then selecting the **Create** option, the following drop down menu appears. The user may then select the desired action.

Travelers will use UTS to **initially** request a **travel authorization** and then a subsequent request for **advance**, or **settlement** at the **conclusion** of the trip.

See Also

About Travel Authorizations

About Travel Orders

About Travel Advances

About Travel Settlements

About Local 1164 Travel

Proxy

About Proxy

There are **two** different **Proxy** capabilities that can be established within UTS.

- Agency Proxy
- Signature Proxy

Agency Proxy

Any individual possessing an active UTS user account may act as a Proxy for requesting travel actions on the behalf of any traveler within the same organization. When logged into UTS in the **Proxy** view, the user has the ability to initiate a variety of travel actions for any other individual assigned to the same **unit**. The Agency Proxy completes the initial request on the behalf of the traveler, but cannot release the action for further processing. The action may only be released by the **Traveler** or the **Signature Proxy**.

By clicking on the **File** menu and then selecting the **Create** option at the UTS Request Status screen, the following drop down menu appears. The Agency Proxy may then select the desired option.

Note: Requests for **authorizations** and **settlement** actions completed by the **Agency Proxy** are returned to the traveler to be released to the **AO** for approval.

Signature Proxy

Occasionally, a traveler may be unable or unavailable to access UTS to release their own requested travel action. When this situation is anticipated, or simply as a precaution, a traveler may designate another individual as a **Signature Proxy**. Signature Proxies have the same capabilities as Agency Proxies to request or complete various travel actions for other individuals. In addition, settlement actions released by the Signature Proxy are electronically signed on behalf of the traveler and forwarded to the Authorizing Official.

Note: A **Signature Proxy** acts on the behalf of the **Traveler** and has the same capabilities.

See Also

Designating an Agency Proxy

Designating a Signature Proxy

Designating an Agency Proxy

No special action is required to designate an individual to be an **Agency Proxy** for a particular unit. All personnel who are authorized to use UTS may perform Proxy services for any other individual assigned to the same Unit.

To perform Proxy services, however, an individual must change their view to **Proxy** after logging into UTS.

See Also

Changing View

Designating a Signature Proxy

When necessary, **Travelers** may designate another individual to act as a **Signature Proxy** for initiating and releasing travel actions on their behalf.

Complete the following steps to designate a Signature Proxy:

1. Login to UTS in the **Traveler** view mode or change the view to Traveler if necessary.
2. At the **UTS Request Status** screen, **click** on the **Profile** menu.
3. At the Profile drop down menu, **click** on **Modify or View Profile**.
4. At the **Personal Profile** screen, **click** on the **Security** button.
5. At the **Security Information** screen, **click** the **Signature Proxy** field.

6. At the Signature Proxy field, the user must enter the first (2) letters of the desired Signature Proxies **last name**. A listing of **Names**, beginning with the two letters entered, appears. If the desired name is highlighted, press **Enter**. If the desired name is not highlighted, **click** the *Up/Down* arrows on the keyboard to scroll through the list until the correct name appears.
7. When the desired name is highlighted, press **Enter** to make the selection.
8. When finished, **click** the **Previous Screen** button.
9. At the **Personal Profile** screen, **click** the **Save** button.

See Also

About Proxies

Authorizing Official

About Authorizing Officials

Authorizing Officials (**AO's**) are individuals who have been designated to **approve** requests for travel **authorizations**, **advances**, and **settlements** for a specific **organization** or individual **traveler**. This designation is generally pre-determined and incorporated into the UTS database when the personnel file is imported. AO's may also be designated by the UTS System Administrator.

When **units** and **personnel** are added to the UTS database, a **default AO** is established. UTS **System Administrators** have the ability to **change** or **reassign** the default AO's as required.

When traveler's are **forwarding** their requests to the AO for approval, they have the ability to select a **different** AO if necessary.

A request for **advance** or **settlement** cannot be **processed** until a travel authorization has been **approved** by an AO or there is an approved travel order in the UTS database.

Requests for **advances** and **settlements** cannot be **transmitted** to the Integrated Automated Travel System, (**IATS**), for computation until **approved** by an AO.

See Also

Approving Requests

Returning Requests

Forwarding Requests

Approving Requests

A request for **advance** or **settlement** cannot be **processed** without one of the following:

- A UTS created **Travel Authorization** approved by an AO.
- A **Travel Order**, for the associated claim, in the UTS database.

In addition, requests for **advances** and **settlements** cannot be **transmitted** to the Integrated Automated Travel System (**IATS**) for computation until **approved** by an AO.

After travel requests are processed by a **Traveler** or **Proxy**, they must be **released** to an **AO** for approval. Once released, AO's approve travel requests by logging into UTS in the Authorizing Official view, selecting the transactions, and reviewing the entries. The AO can then either **approve** the transactions or **return** them to the source.

Complete the following steps to approve a Travel Request:

1. Login to UTS in the **Authorizing Official** view, or change the view to AO if necessary.
2. At the **UTS Requests Requiring Action** screen, any transactions **pending approval** by the AO are **displayed** in the Claims List. **Point** and **click** on the desired transaction.
3. Once a transaction is selected, either **click** the **Modify or View** button, or **click** the **File** menu and then **click** on the **Modify or View** option. Depending on the type of transaction selected, either the **Request for Authorization** or **Request for Settlement** screen appears.
4. At either the **Request for Authorization** or **Request for Settlement** screen, the AO must review the entries and then **click** the **Send To** button.

5. After clicking on the **Send To** button, a pop-up appears with the choices Return to Traveler or Approved. **Click** on **Approved**.
6. A screen appears next requiring the AO to enter a **confirmation password**. This is the Secondary Password that was created when the AO's Personal **Profile** was created. **Enter** the confirmation password and **click** the **Done** button.

See Also

Returning Requests

Forwarding Requests

Returning Requests

Rather than approving a requested travel action, an AO may elect to **return** the request to the traveler. The request could be **disapproved** or **corrections** may be required prior to approval.

Complete the following steps to Return a travel request:

1. Login to UTS in the **Authorizing Official** view, or change the view to AO if necessary.
2. At the **UTS Requests Requiring Action** screen , any transactions **pending approval** by the AO are **displayed** in the Claims List. **Point** and **click** on the desired transaction.
3. Once a transaction is selected, there are (3) methods for returning travel requests:
 - **Method 1: - Click** the **Return to Traveler** button.
 - **Method 2: - Click** the **File** menu and then **click** on the **Return to Traveler** option.
 - **Method 3: - Click** the **Modify or View**. Depending on the type of transaction selected, either the Request for Authorization or Request for Settlement screen appears. At this screen, the AO must review the entries and then **click** the **Send To** button. After clicking on the Send To button, a pop-up appears with the choices Return to Traveler or Approved. **Click** on **Return to Traveler**.
4. After using one of the methods described above, UTS displays the **Remarks** screen. At this screen, the AO must enter an **explanation** as to why the request is being return and what action is required.

5. **Enter** the desired remark and **click** the **Continue** button. UTS returns the request.

See Also

Approving Requests

Forwarding Requests

Forwarding Requests

If an AO knows that he/she will be **unavailable** to process travel requests during a certain period, UTS provides a feature that allows the AO to automatically or manually **forward** all incoming requests to **another** AO. This could occur if an AO is going on **vacation** or **TDY**.

- Forwarding can be done **automatically** by UTS or **manually** by the original AO.
- **Automatic Forwarding** is done through the **Enable Forwarding** option. When Forwarding is enabled, UTS automatically routes travel requests released to the **original** AO to the **designated** AO for a specified period. Only requests that are released after Forwarding is enabled are affected. Any requests that have already been released and are pending action by the AO, must be manually forwarded.
- **Manual Forwarding** is done by the **original** AO by using the **Forward This Request** or **Forward all Requests** options.

The following links provide detailed instructions on how to Forward requests:

Automatic Forwarding

Manual Forwarding

Automatic Forwarding

Complete the following steps to Enable Automatic Forwarding:

1. Login to UTS in the **Authorizing Official** view, or change the view to AO if necessary.

2. At the **UTS Requests Requiring Action** screen, **click** on the **Forwarding** menu and then **click** on the **Enable Forwarding** option.
3. After clicking the Enabling option, a screen appears requiring the AO to specify the period and select a new AO. Enter the required information in the following fields to complete this screen:
 - **Effective Starting Date** - The current date defaults to this field. **Enter** a new date, or **press** the **Tab** key to continue.
 - **Effective Ending Date** - The current date defaults to this field. **Enter** a new date, or **press** the **Tab** key to continue.
 - **New AO** - **Click** in the **New AO** field and a drop down **listing** of possible AO's appears. **Point** and **click** on the desired AO to make a selection.
4. After selecting a new AO, **click** the **Done** button.
5. A pop-up appears indicating the **name** of the new **AO** requests will now be forwarded to. Click **OK** to complete the process.

Complete the following steps to Disable Automatic Forwarding:

1. Login to UTS in the **Authorizing Official** view, or change the view to AO if necessary.
2. At the **UTS Requests Requiring Action** screen, **click** on the **Forward** menu and then **click** on the **Disable Forwarding** option.

3. A pop-up appears indicating the name of the AO the requests are **currently** being forwarded to and whether this option should be disabled. **Click** on the **Yes** button.

See Also

Manual Forwarding

Manual Forwarding

Complete the following steps to Manually Forward requests:

1. Login to UTS in the **Authorizing Official** view, or change the view to AO if necessary.
2. At the **UTS Requests Requiring Action** screen, any transactions **pending approval** by the AO are **displayed** in the Claims List. **Point** and **click** on the desired transaction.
3. Once a transaction is selected, **click** the **Forward** menu and then **click** on either the **Forward This Request** or **Forward all Requests** options.
4. After selecting one of the manual forwarding options, a screen appears requiring the AO to specify which new AO the requests should be sent to. **Click** in the **New Administrator** field and a drop down **listing** of possible AO's appears. **Point** and **click** on the desired AO to make a selection.

5. After selecting a new AO, click the **Done** button.

See Also

Automatic Forwarding

System Administrator

About System Administrators

UTS System Administrators have **exclusive** access to the UTS **Maintenance** Module. Only users with this privilege can log into this module.

As a System Administrator, (SA), the user has the ability to **create** user **accounts** manually and assign **privileges**. In addition to creating accounts, the SA can also modify or delete them. The SA is also responsible for **importing data files** to update various tables and **creating export files** to interface with the travel computation system (**IATS**).

The System Administrator designation is generally pre-determined and incorporated into the UTS database when the personnel file is imported. A System Administrator can also **grant** the SA **privilege** when **creating** or **modifying** user **profiles**.

The following links provide detailed instructions for performing the various System Administrator functions:

Exporting Claims

Maintaining User Accounts

Maintaining City Names and Rates

Reassigning Authorizing Officials

Maintaining Accounting

Maintain Ships Table

Establish Miscellaneous Parameters

Maintaining Units

Importing Unit Data

Importing Reimbursable Exp. Descriptions

Importing Personnel Data

Importing Accounting Data